

# Application for Mortgage Loan



**Kathie Scott**  
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[www.kathiescott.com](http://www.kathiescott.com)

- Pre-Approval  
  Purchase  
  Purchase or Refinance of Rental Property  
  Re-Finance  
  Switch

## Applicant #1

First Name		Last Name		S.I.N #		Birth Date		Marital Status	Dependants	
Current Address						How Long?	Rent or Own	Renting?	If less than 3 years...	
number	street	city	province	postal code			\$ _____ mo.			
Previous Address						How Long?				
number	street	city	province	postal code						
Home Phone			Cell Phone			Email				
Current Employer				Address			Work #		Occupation	
Length of employment		In current line of business		Gross Annual Income						
				\$						
Previous Employer				Address			Years	Gross Annual Income		
								\$		

## Applicant #2

First Name		Last Name		S.I.N #		Birth Date		Marital Status	Dependants	
Current Address						How Long?	Rent or Own	Renting?	If less than 3 years...	
number	street	city	province	postal code			\$ _____ mo.			
Previous Address						How Long?				
number	street	city	province	postal code						
Home Phone			Cell Phone			Email				
Current Employer				Address			Work #		Occupation	
Length of employment		In current line of business		Gross Annual Income						
				\$						
Previous Employer				Address			Years	Gross Annual Income		
								\$		

Other Income Source		Amount
		\$

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# Personal Net Worth Statement

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## Assets

<b>CASH</b>	Financial Institution		Account Type	How Long?	Balance
					\$
<b>RRSP</b>	Amount \$	<b>Stocks / Bonds</b>	Amount \$	<b>Term Deposits</b>	Amount \$
					Are you currently working with a Financial Advisor?
<b>Auto</b>	Year & Type		Value \$		
<b>Home Res.</b>	Value \$		<b>Other Property</b>	Value \$	<b>Comments:</b>

## Liabilities

<b>Credit Card 1</b>	Name	Balance \$	Monthly Payment \$
<b>Credit Card 2</b>	Name	Balance \$	Monthly Payment \$
<b>Credit Card 3</b>	Name	Balance \$	Monthly Payment \$
<b>Loan 1</b>	Name	Balance \$	Monthly Payment \$
<b>Loan 2</b>	Name	Balance \$	Monthly Payment \$
<b>Auto</b>	Name	Balance \$	Monthly Payment \$
<b>Residential Mortgage</b>	Held By	Balance \$	Monthly Payment \$
<b>Other Mortgage</b>	Held By	Balance \$	Monthly Payment \$

## Refinance Info- To be filled out by clients wishing to refinance their existing property

<b>Property Type</b>		<b>Date Purchased</b>	
<b>Square Footage</b>		<b>Current Mortgage Holder</b>	
<b>Garage Size</b>	Single / Double / Triple / None / Other	<b>Original Purchase Price</b>	\$
<b>Garage Type</b>	Attached / Detached	<b>Original Mortgage Amount</b>	\$
<b># of Stories</b>	1 2 3	<b>Current Outstanding Mortgage Amount</b>	\$
<b>Age of Property</b>	years old	<b>Payout Penalty</b>	\$
<b>Property Taxes</b>	\$	<b>Rental Income</b>	\$
<b>Condo Fees / Maintenance</b>	\$		

Down Payment: \$
Purchase Price: \$
Term:
How do you like to make your payments? <div style="text-align: center;"> <input type="checkbox"/> W <input type="checkbox"/> B W <input type="checkbox"/> S M <input type="checkbox"/> M                 </div>
<b>Broker Comments:</b>

I/We hereby certify that the information we have given, to the best of our knowledge is correct and true. I/We consent to Invis and/or it's agent, obtaining reports containing credit and/or personal information as necessary in connection with this application.

Applicant: \_\_\_\_\_ Date: \_\_\_\_\_

Co-Applicant: \_\_\_\_\_ Date: \_\_\_\_\_

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**Read this important information before sending**